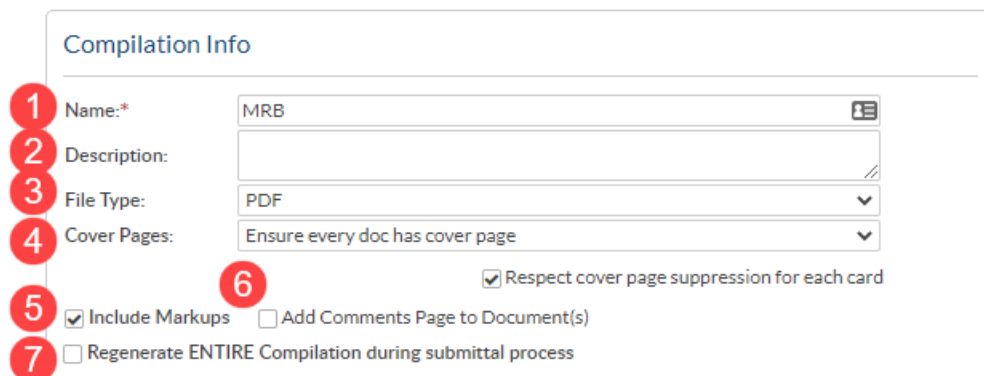


Overview of Compilation Options

04/16/2025 2:26 pm MDT

Compilation Info

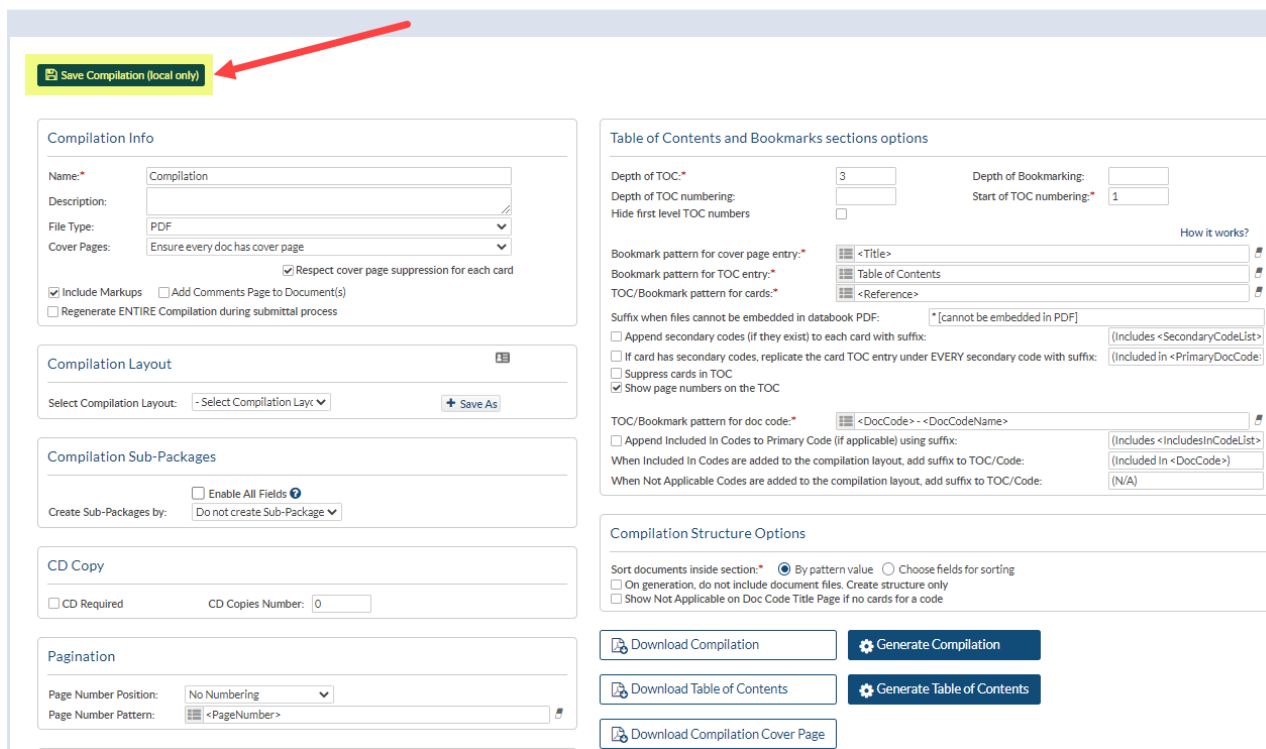


The screenshot shows a 'Compilation Info' form with the following fields and options:

- 1 Name:** A text input field containing 'MRB'.
- 2 Description:** A text input field.
- 3 File Type:** A dropdown menu showing 'PDF'.
- 4 Cover Pages:** A dropdown menu showing 'Ensure every doc has cover page'.
- 6** (points to a checkbox): ☒ Respect cover page suppression for each card
- 5** (points to a checkbox): ☒ Include Markups
- 6** (points to a checkbox): ☐ Add Comments Page to Document(s)
- 7** (points to a checkbox): ☐ Regenerate ENTIRE Compilation during submittal process

- 1. Name:** The name of the compilation.
- 2. Description:** Additional information that has to be included about the compilation.
- 3. File Type:** Choose to produce compilation as a single pdf file or a zip with folders.
- 4. Cover Pages:** Available options for cover pages are "No Cover Pages", "Keep cover pages on returned docs only" and "Ensure every doc has cover page". Note: When "Respect cover page suppression for each card" is selected - whether you've selected to "Keep cover pages on returned docs only" or "Ensure every doc has cover page" - DocBoss will ensure that if you've chosen "No stamp and no cover page" on a particular card, no cover page will be added to that card in the compilation. If the compilation is zip file type, cover pages will be merged into PDFs and generated as a separate file alongside non-PDF files.
- 5. Include Markups:** Check option if markups shall be included in the documents
- 6. Add Comments Page to Document(s):** If documents must contain the Comments Pages when building the compilation the check box shall be marked.
- 7. Regenerate ENTIRE Compilation during submittal process:** If this option is selected the Compilation (and Index if also linked to the compilation) will be regenerated during each submittal. The Index and compilation will automatically update to reflect any card changes upon submittal. If this is not enabled, you will need to manually regenerate the Compilation/Index to ensure the latest version is submitted out of DocBoss. For large projects, this should be left unchecked as the transmittal process will slow down as a result.

Note: if you make any changes to the above selections, you will need to save the compilation prior to Generating, by pressing Save Compilation (local only)



Save Compilation (local only)

Compilation Info

Name: * Compilation
Description:
File Type: PDF
Cover Pages: Ensure every doc has cover page
☒ Respect cover page suppression for each card
☒ Include Markups ☐ Add Comments Page to Document(s)
☐ Regenerate ENTIRE Compilation during submittal process

Compilation Layout

Select Compilation Layout: - Select Compilation Layc
+ Save As

Compilation Sub-Packages

Create Sub-Packages by: ☐ Enable All Fields ☒ Do not create Sub-Package

CD Copy

☐ CD Required CD Copies Number: 0

Pagination

Page Number Position: No Numbering
Page Number Pattern: <PageNumber>

Table of Contents and Bookmarks sections options

Depth of TOC: * 3
Depth of TOC numbering:
Hide first level TOC numbers ☐
Depth of Bookmarking:
Start of TOC numbering: * 1
How it works?
Bookmark pattern for cover page entry: * <Title>
Bookmark pattern for TOC entry: * Table of Contents
TOC/Bookmark pattern for cards: * <Reference>
Suffix when files cannot be embedded in databook PDF: * [cannot be embedded in PDF]
☐ Append secondary codes (if they exist) to each card with suffix: (Includes <SecondaryCodeList>
☐ If card has secondary codes, replicate the card TOC entry under EVERY secondary code with suffix: (Included in <PrimaryDocCode>
☐ Suppress cards in TOC
☒ Show page numbers on the TOC
TOC/Bookmark pattern for doc code: * <DocCode> - <DocCodeName>
☐ Append Included In Codes to Primary Code (if applicable) using suffix: (Includes <IncludesInCodeList>
When Included In Codes are added to the compilation layout, add suffix to TOC/Code: (Included in <DocCode>)
When Not Applicable Codes are added to the compilation layout, add suffix to TOC/Code: (N/A)

Compilation Structure Options

Sort documents inside section: * ☒ By pattern value ☐ Choose fields for sorting
☐ On generation, do not include document files. Create structure only
☐ Show Not Applicable on Doc Code Title Page if no cards for a code

Download Compilation **Generate Compilation**
Download Table of Contents **Generate Table of Contents**
Download Compilation Cover Page

Compilation Layout

Compilation Layout

Select Compilation Layout: - Select Compilation Layc **+ Save As**

A predefined layout can be selected or specific layouts can be saved for future compilations.

Details are available [here](#).

Compilation Sub-Packages

Compilation Sub-Packages

☒ Enable All Fields ?

Create Sub-Packages by: **Do not create Sub-Package:** **Do not create Sub-Packages**
Item/Model
Line No. (Acme)
Line No. (Wolfe)
PO No. (Acme)
PO Rev No. (Acme)
Sub-Supplier
Tag No.
Vessel

Sub-Packages can be created (based on your selection) within the compilation.

Once created, Sub-Package Sections can be ordered as desired.

CD Copy

CD Copy

CD Required:

☐

CD Copies Number:

This information is used strictly in the pricing module. It help you charge customers for document services - including a fee for the number of CD's being created.

Paging


Pagination

Page Number Position:


No Numbering

▼

Page Number Pattern:



<PageNumber>



Page number position can be selected for header and footer, with various location options.

Templates

Templates

Compilation Cover Page:

Default Compilation Cover Page (system)

▼

Table of Contents:*

Compilation Table of Contents Template (system)

▼

Section Title Page:*

Compilation Section Title Page (with Substructure) (system)

▼

Doc Code Title Page:*

Compilation Doc Code Title Page (system)

▼

There are four different templates used in compilations. Select the applicable templates for the TOC and different cover pages.

Details about each template are available [here](#).

Table of Contents and Bookmarks section options

Detailed information about Table of Contents and Bookmark section options is available [here](#).

Compilation Structure Options

Compilation Structure Options

Sort documents inside section:*

☐ By pattern value
☒ Choose fields for sorting

☐ On generation, do not include document files. Create structure only
☐ Show Not Applicable on Doc Code Title Page if no cards for a code
☒ Disable title page for Doc Code
☒ Hide Doc Code from TOC/Bookmarks List
☒ Default to Allow Submittal Anytime ?

Sorting documents inside section:

Sorting values can be selected by patterns selected under "Table of Contents and Bookmarks sections options" or choosing fields here.

Compilation Structure Options

Sort documents inside section:*

☐ By pattern value
☒ Choose fields for sorting

Acme Sequence

Acme Sheet

CardName(Auto)

Doc Code

Doc No. (Acme)

Doc No. (End User)

Doc No. (Wolfe)

Line No. List (Acme)

Line No. List (Wolfe)

Reference

Rev # (Demo)

Review Type

Sequence (Wolfe)

Sheet (Wolfe)

Tag No. List

Title

* available variables

On generation, do not include document file. Create structure only

This gives you the option to check if the compilation structure is correct without including the files, which will save you time when generating the compilation.

Show Not Applicable on Doc Code Title Page if no cards for a code

This option can be used when cover pages shall be included in the compilation even if there are no files attached. An example of when this would apply is if you are creating compilations based on "Shipment" level. Shipment 1 does have D04 - Specialty Drawings, Shipment 2 does not. To keep the compilations consistent you still want to show the code but there are no actual cards for this code on Shipment 2. Therefore a cover page will still be added but will indicate Not Applicable on it.

Acme Chemical
 Little Project - Acme
 PO#: 5678
 4528KR

1.4 D04 - Specialty Drawings
 Not Applicable


When enabled - and new codes are added to the book, they will default to have the title pages disabled (saves having to click each icon for each code). Available on overall default settings for system.


Similar to above - a default value which appears only when the previous setting is enabled. Again - set the default value to hide doc codes from TOC/Bookmarks without having to click each code. Available on overall default settings for system.


This is generally controlled from the doc code - but can be set as default on compilations. Available on overall default settings for system.


Generate Compilation / Download Compilation


Note - you must Generate Compilation before you can Download Compilation

 Download Compilation

 Generate Compilation


 Download Table of Contents

 Generate Table of Contents

 Download Compilation Cover Page









Regenerating Status


This area shows the status of your generated Compilation or Table of Contents



Regenerating Status 



Compilation regenerating process started at 2021-02-04 14:19:27. It is 71.00% complete
Table of Contents was successfully regenerated at 2021-02-04 12:49:16.


The current generation status can also be seen by clicking on the "Active Processes" tool on the top bar of your screen

 Big Project - Kirstie (452...  Index Reports & Compilations   1 Projects    

Current Processes List 

Process 						
Project	User	Start time	Name	Percent	Status	Tools
Big Project - Kirstie	Kirstie Reid	2021-02-04 14:19:27	Compilation "DATABOOK" generation	32.16	In-process	

No more pages  Show on Page: 20 

Status Filter: Show Active Only 

Ok

Document Codes and Sections

To add the codes to the compilation there a couple of easy options. You can 1) simply drag and drop the code from the left grid into the right "Document Codes and Sections" grid, or 2) you can click "Add Code" and it will place the document into the grid or 3) you can highlight multiple codes and "Add Selected"

Codes not included in Compilation ☐ Show N/A and Included In Codes

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

Drag Doc Codes to the content structure. Add selected >> Add all codes >>

Doc Code	Type	Tools
AC General Arrangement Drawings (Total docs: 3)	Doc Code	[Icons]
CU Not Available (Total docs: 1)	Doc Code	[Icons]
CX Included in CV (Total docs: 1)	Doc Code	[Icons]
DB NDT Records (Total docs: 36)	Doc Code	[Icons]
DS Data Sheets (Total docs: 36)	Doc Code	[Icons]
ITP Inspection Test Plan (Total docs: 1)	Doc Code	[Icons]
MB Manufacturer Data Book (Total docs: 36)	Doc Code	[Icons]

Document Codes and Sections

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

+ Compilation Cover Page + Index + Section

Sort Alphabetically

Name	Type	Tools
Table of Contents	TOC	[Icons]
1 AA Document Schedule (Order)	Doc Code	[Icons]
2 CD Material Test Certificates (Tag (TE))	Doc Code	[Icons]

Show N/A and Included In Codes

Mark the check box to include the Doc Codes that were marked as N/A or Included In in the Doc Requirements grid.

Codes not included in Compilation ☒ Show N/A and Included In Codes

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

Drag Doc Codes to the content structure. Add selected >> Add all codes >>

Doc Code	Type	Tools
B02 Vendor Document Register (Total docs: 1)	Doc Code	[Icons]
B03 Fabrication / Production Schedule (Total docs: 1)	Doc Code	[Icons]
B06 Table Of Contents (Total docs: 1)	Doc Code	[Icons]
B14 Vendor Sub-Orders (Total docs: 1)	Doc Code	[Icons]

Document Codes and Sections

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

+ Index + Section

Sort Alphabetically

Name	Type	Tools
Compilation Cover Page	Cover Page	[Icons]
Table of Contents	TOC	[Icons]
1 E09 Installation Drawings (Order)	Doc Code	[Icons]

Creating your Compilation layout

Here you can create and preview the general layout of your compilation. Once you have added your codes (as outlined above), you can now add your Compilation Cover Page, Index, and sections then rearrange them to your customers requirements.

Document Codes and Sections

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

+ Compilation Cover Page + Index + Section

Sort Alphabetically

Name	Type	Tools
Table of Contents	TOC	[Icons]
1 ENGINEERING	Section	[Icons]
1.1 AA Document Schedule (Order)	Doc Code	[Icons]
2 DRAWINGS	Section	[Icons]
2.1 AC General Arrangement Drawings (Item/Model (TE))	Doc Code	[Icons]
3 QUALITY	Section	[Icons]
3.1 CC Quality Plan (Order)	Doc Code	[Icons]
3.2 CD Material Test Certificates / Traceability Sheet (Tag (TE))	Doc Code	[Icons]

Clicking on the Compilation Cover page will automatically place the cover page at the top (beginning of your book).

To add sections to your compilation, click on "Section". You will name your section. Once you have created your sections, you can drag and drop anywhere you'd like. To add documents to your sections, simply drag and drop them on top of the section.

Add Section



Name*

Included In*

Cancel

Save

If you wish to add an Index you can do so here. Clicking on the Index button will bring up a new screen where you will name your Index, choose where you want to insert it (if left at default "\" it will be placed at the very end of the compilation), which template you'd like to use, and which codes sections/codes you wish to include.

Add Index



















Name*

Included In*

Index template*

Please choose items to include into Index

☐ All sections and doc codes

Name	Type	Include
 Compilation Cover Page	Cover Page	<input type="checkbox"/>
 Table of Contents	TOC	<input type="checkbox"/>
▼  1 ENGINEERING	Section	<input type="checkbox"/>
 1.1 AA Document Schedule (Order)	Doc Code	<input type="checkbox"/>
▼  2 DRAWINGS	Section	<input type="checkbox"/>
 2.1 AC General Arrangement Drawings (Item/Model (TE))	Doc Code	<input type="checkbox"/>
▼  3 QUALITY	Section	<input type="checkbox"/>
 3.1 CC Quality Plan (Order)	Doc Code	<input type="checkbox"/>
 3.2 CD Material Test Certificates / Traceability Sheet (Tag (TE))	Doc Code	<input type="checkbox"/>
 3.3 CJ Welding Procedure Specification (Order)	Doc Code	<input type="checkbox"/>
 3.4 CS Factory Acceptance Test (FAT) Procedures (Order)	Doc Code	<input type="checkbox"/>
 3.5 CT Factory Acceptance Test (FAT) Records (Order)	Doc Code	<input type="checkbox"/>
▼  4 INSTRUMENTATION	Section	<input type="checkbox"/>
 4.1 CU Instrument Test & Calibration Certificates (Tag (TE))	Doc Code	<input type="checkbox"/>
 4.2 CV Certificate of Conformity (Order)	Doc Code	<input type="checkbox"/>
 4.3 CX Code Compliance Certificate (Order)	Doc Code	<input type="checkbox"/>

Cancel

Save

There are many layout tools that can be changed in this area of the Compilation layout. To learn more please refer to this article: [Compilation Templates and Layout Impacts](#)

We also have an article specifically for Sorting Options in Compilations [here](#).

For more about how compilations are created have a look at our video: [Create Compilations in DocBoss](#).
